

# POLK BROS FOUNDATION

## Letter of Interest (LOI): Emerging Strategies to Advance Shared Ownership

LOI Release Date:	March 2, 2026
Information Session:	March 9, 2026, 12:00 PM
LOI Submission Deadline:	March 27, 2026, 5:00 PM

### Grantmaking Criteria

Organizations that meet the eligibility criteria and see alignment with this opportunity are invited to apply through a two-phase application process.

Competitive applicants will:

- Reflect a sustained commitment, values driven commitment to cooperative principles, including democratic governance, shared wealth creation, and community accountability -
- Demonstrate clear alignment with shared ownership and community wealth-building goals
- Accelerate the growth of shared ownership in in historically disinvested neighborhoods for low-income residents
- Present a clear, feasible approach appropriate to the project's stage of development

**Phase I:** Open Call – Letter of Interest (LOI) – Two page maximum (Use the fillable form provided below and on PBF sites)

All eligible organizations may submit a Letter of Interest. LOIs will be evaluated based on the level of alignment with the priority activities described in this RFP and Polk Bros. Foundation's strategic goals. **To capture the information needed to evaluate the submitted LOIs, please provide a short response that addresses all the components listed below.**

- Organizational Overview:
  - Mission – include the organization's overall mission statement
  - Organizational Description - include a few sentences on the description of the organization's history and core work
- Grant Request Information:
  - Provide a concise description of this grant request, including its specific [charitable purpose](#), and your organization's capacity to carry out this work.
    - Indicate which specific shared ownership model(s) your organization will pursue (or if field-building, please indicate that)
  - Indicate whether any portion of the work is time sensitive. If so, please briefly explain the relevant deadlines, external factors, or opportunities that make timely funding important.
- Community Engagement and Governance
  - Describe how residents, workers, or community members are meaningfully involved in ownership, governance, or decision-making and how your work supports those efforts

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- Stage of Development:
  - Indicate the current state of the project or initiative:
    - Early stage
    - Pilot
    - Implementation
    - Scaling
    - Ecosystem support
- Data/Outcomes to Date
  - If the proposed work builds on or expands an initiative or program, briefly describe any progress, outcomes, or key learnings to date. This may include early results, outputs, participation levels, milestones achieved, or other indicators that demonstrate momentum, feasibility, or community impact.

Additional Requested Documents (not counted toward two-page limit):

- Organizational Budgets – include 1) last full year’s itemized revenue and expenses, as well as 2) current fiscal year’s budget with itemized revenue and expenses
- If a program or organization is fiscally sponsored, the fiscal sponsor must be the applicant submitting the LOI and provide required information. This will include a copy of the fiscal sponsorship agreement between the sponsor and the sponsored project.

**Letter of Interest (LOI): Emerging Strategies to Advance Shared Ownership**

Organizational Overview:

Grant Request Information

# Letter of Interest (LOI): Emerging Strategies to Advance Shared Ownership

Community Engagement and Governance

Stage of Development (select one)

<input type="checkbox"/> Early Stage	<input type="checkbox"/> Pilot	<input type="checkbox"/> Implementation	<input type="checkbox"/> Scaling	<input type="checkbox"/> Ecosystem Support
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Data / Outcomes to Date